



**WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION  
ATTN: JOHN DEBACHER  
DIVISION FOR LIBRARIES AND TECHNOLOGY  
PO BOX 7841  
MADISON, WI 53707-7841**

Also send a copy of the completed Word document to  
[libraryreports@dpi.wi.gov](mailto:libraryreports@dpi.wi.gov)

Required by § 43.17(5) and 43.24(3) Wis. Stats.

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**GENERAL INFORMATION**

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Library System

Lakeshores Library System

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Describe demographic, economic, and other facts about your system that influenced the development of this and other system plans.

Demographic and economic trends in the Lakeshores Library System (LLS) service area have remained stable. Overall population of the entire system area hovers slightly below 300,000 residents. Roughly two thirds (200,000) are residents of Racine County, and one third (100,000) are residents of Walworth County. Also demographically consistent is the fact that roughly half of the resident population of the system area live in municipalities that do not maintain their own libraries. This factor means that county reimbursement for services provided to county residents without a municipal library is particularly vital to the LLS member libraries. In other words, a majority of the LLS member libraries derive over half of their annual operating budget from county reimbursement, which means that the loss of county reimbursement would have an immediate and catastrophic effect on the provision of services to residents of the LLS area. The LLS service area sits in a largely rural "pocket" between the large urban regions of Chicago and Milwaukee, and includes a number of communities with a significant seasonal residency aspect. This translates into a comparatively low tax base, which can occasionally be an additional limiting factor in areas such as service development, capital improvements and staff salary and benefit levels. Despite these challenges, our member libraries continue to pursue innovative solutions to addressing these elements of scarcity.

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Describe significant needs and problems that influenced the development of this and other system plans.

There are a number of projects and events that are either currently influencing, or will soon influence, the system planning process at LLS.

The Kenosha County Library System (KCLS) joined the SHARE Consortium in early 2017. The SHARE Consortium is an automation partnership that provides libraries with cost effective access to a well-managed suite of library automation software. SHARE is semi-autonomous from LLS - a relationship established by an agreement exists between the LLS Board of Trustees and the chief governing body of SHARE (called the "Director's Council"). Under this agreement, LLS serves as fiscal agent for contractual purposes, and also provides the day-to-day technical and logistical support required to "run" the software and maintain an effective planning and governance environment. To facilitate KCLS's entry into the consortium, LLS also initiated a separate agreement to provide support to them, given that the member libraries of KCLS are not actual member libraries of LLS.

Also over the past year, the Arrowhead Library System (ALS) - which serves Rock County - initiated a request to join SHARE. The request was approved by each of the involved stakeholder governing bodies (ALS Board, LLS Board, SHARE Director's Council) and we are currently involved in the process of data migration and training, which we estimate will culminate in a "go live" day of approximately January 18<sup>th</sup>, 2018. We anticipate that the expansion of the consortium by an additional seven libraries will further expand economies of scale, and drive costs down further, and enhance resource sharing across the four county service area that SHARE will soon encompass. Related to this project, LLS intends to expand our technical staff team to accommodate the increasing size of the membership.

The Public Library System Redesign (PLSR) project is also a factor in system planning process, even if potential outcomes are currently unknown. Thus far, the main impact of PLSR on system planning is hypothetical: LLS recognizes the need to be flexible - both in mindset and budgeting. LLS is moving forward with projects, partnerships, and service delivery to the best of our ability, while keeping in mind that the PLSR project may result in changes to how regional services are offered in Wisconsin.

LLS is also closely following the potential location of an enormous Foxconn production facility within our service area. If constructed, it is possible that this facility will become a significant driver of demographic and economic change - and bring with it an expansion in need for public library services in the area. If this occurs, LLS will be poised to work with our member libraries to devise efficient, effective methods and means to meet these new needs.

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	<b>GENERAL INFORMATION (cont'd.)</b>	
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Describe the planning environment and process under which this and other system plans were developed. Include how member libraries are involved in plan development and review and whether your systems has a formally appointed advisory committee. (List additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the division.)

Member libraries are frequently solicited for feedback and advice throughout the year in regard to specific programs and initiatives that become woven-in to the ongoing continuum of planning at LLS. The existence of an Librarian Advisory Council (LAC) is enshrined in the system bylaws, and meets on a monthly basis to engage in multiple forms of continuous planning. The LAC is specifically petitioned for feedback in regard to the system planning process each fall, prior to the composition and filing of the system plan. The plan is discussed and approved by the LLS Board of Trustees, which meets at least six times per year. The LLS Board maintains four standing committees according to its bylaws: an Executive Committee, a Finance Committee, a Personnel Committee, and a Long Range Planning Committee. These committees collaborate over the course of each given year in ongoing planning, with a flurry of activity prior to plan development in late summer.

	<b>ASSURANCES</b>	
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The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year 2018. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

**S.43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section it shall ensure that all of the following are provided:**

**Membership Agreements**

- (a) Written agreements that comply with s. 43.15(4)(c)4. with all member libraries.
- A copy of the agreement with a list of all members signing and the dates signed provided to the division by January 15.

**Resource Library Agreement**

- (b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.
- A signed copy of the resource library agreement will be provided to the division by January 15.

**Reference Referral, Interlibrary Loan, and Technology**

- S.43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

**List ongoing activities related to this requirement.**

Referral of reference requests within and without the system has become a trivial process with the ubiquity of online communication and information tools - and this is mostly handled on-demand by individual libraries. LLS are available to assist, but in most cases involving the system would be an un-needed bureaucratic layer.

Interlibrary loan requests coming from outside of the LLS member libraries are tracked and cleared by the LLS Interlibrary Loan Specialist.

**Indicate new or priority activities relating to this requirement for the plan year. If none, indicate so.**

We do not have any specific new or priority activities relating to this requirement to indicate at this time, other than to mention that the expansion of the SHARE Consortium to further include the ALS member libraries may result in some degree of significant change in how in-system and out-of-system requests "flow" across the four county service area. We do not yet have specifics as to whether or to what degree changes may result.

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**ASSURANCES (cont'd.)**


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**Inservice Training**

- S.43.24(2)(e) Inservice training for participating public library personnel and trustees.

**List ongoing activities related to this requirement.**

LLS provides two main categories of activities that relate to this requirement, including SHARE automation training, and training activities related to general continuing education.

**Indicate new or priority activities relating to this requirement for the plan year. If none, indicate so.**

In late 2017 and early 2018, we are planning to increase the number of inservice events geared toward SHARE automation training - in response to the expansion of the SHARE consortium to include the KCLS and ALS member libraries.

**List specific staff and resources dedicated to this requirement and/or contract arrangements with other libraries or systems.**

Primary staff resources dedicated to this requirement are the System Administrator, System IT Manager, and Technology Services Specialist. The Administrator serves as the local point-person as part of LLS's involvement in the SEWI Continuing Education cooperative, and our IT Manager and Technology Services Specialist deliver training related to the SHARE Consortium. System funding devoted to inservice training includes salary & benefits funding for personnel, and an annual funding contribution to the SEWI Continuing Education cooperative.

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**Delivery and Communication**

- S. 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

**List ongoing activities related to this requirement.**

LLS operates a Wide Area Network that serves to facilitate communication across the system area. We have recently converged our Wide Area Network with the Kenosha County Library System, and will be looking to do the same with the Arrowhead Library System. LLS provides free google-app-based email and productivity tools to our member libraries. Related to delivery, LLS funds 85% of the delivery infrastructure that serves the system, including a dedicated system delivery driver, and system membership in the statewide delivery network operated by the South Central Library System (SCLS).

**Indicate new or priority activities relating to this requirement for the plan year. If none, indicate so.**

There is a strong possibility that, with the expansion of SHARE to include KCLS and ALS, a significant reorganization of regional delivery may occur. The exact shape such a reorganization may take is still unknown. Currently, one option being discussed is the relocation of most of the sorting operation from Racine to VIP Services, Inc. in Elkhorn. VIP is dedicated to providing education, care and employment to people with disabilities, and has warehousing, dock, and fleet vehicle capabilities. We see strong potential for a partnership with this organization, and have been actively engaged in discussions with them. We hope that these discussions culminate in an innovative partnership in 2018.

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**Service Agreements**

- S.43.24(2)(g) Service agreements with all adjacent library systems
- A copy of the agreement with adjacent systems with a list of all systems signing the agreement will be provided to the division by January 15.
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**Other Types of Libraries**

- S.43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
- The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. A copy of the agreement with a list of all signing libraries will be provided to the division by January 15.
- Other types of libraries in the system area have had an opportunity to review and comment on the plan.
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	<b>ASSURANCES (cont'd.)</b>	
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**Library Technology and Resource Sharing Plan**

- S.43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
- Member public libraries and other types of libraries in the system area have had an opportunity to review and comment on the plan.
- By January 1, 2018, the system's current plan for library technology and resource sharing or changes to the current plan will be submitted to the division.

**Indicate new or priority activities relating to this requirement for the plan year.**

LLS does not currently have any large scale activities related to this service area that are new. We continue to provide local IT service to our member libraries at nominal cost, organize group purchases of equipment, provide mobile maker kits and work with our libraries on individual technology project with the potential to positively impact other LLS members. As previously mentioned, ALS's entry into the SHARE Consortium will probably result in enhanced resource sharing across the four county service area. LLS remains poised to facilitate this project and adapt our technology practices to provide the best enhancement to resource sharing as possible.

**Professional Consultation**

- S. 43.24(2)(h) Professional consultant services to participating public libraries.

**Specifically identify consultants, their service areas, and related activities.**

Consultation services are provided to a number of stakeholder. First and foremost, library directors are often our number one "customer" in need of consultation. Topics range from new building construction, to board dynamics, to seeking advice about how best to handle certain municipal political situations. We also consult with library trustees, municipal elected officials and county elected (or appointed) officials. With these stakeholders, topics most often relate to library funding, board appointments, and the county reimbursement process.

**Indicate new or priority activities relating to this requirement for the plan year.**

In the coming year, priority activities will include advocacy-building for the SHARE Consortium as it expands to include the ALS member libraries. We will also be working with at least two specific municipal groups exploring the possibility of creating a new branch, renovating an existing building, or constructing anew.

**Indicate specific methods or means of communication with member libraries to fulfill this requirement.**

These days, most of the consulting we do is via email and telephone, either one-off "question and answer" type communications, or multiple back and forth messaging. Often, we are asked to meet on or off site with library directors, library trustees, or county officials.

**Inclusive Services**

- S.43.24(2)(k) Promotion and facilitation of library service to users with special needs.

The division interprets services to users with special needs as inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community, including services to individuals or groups for whom using the public library is difficult, limited, or minimized.

**List ongoing activities related to this requirement.**

LLS maintains a contract-based consultant position dedicated to facilitating a set of service for users with special needs. This position plans and deploys our annual storywagon program, facilitates library participation in the annual nationwide summer reading program, and serves as a point person for inquiries from our member libraries concerning other needs for additional inclusive services. LLS will continue to fund library participation in the 1,000 Books Before Kindergarten App project in 2018. LLS also reaffirmed a partnership with the Rock-Walworth County Head Start program for 2018. LLS continues to facilitate a partnership between the member libraries and workforce development agencies of both member counties to fund access to the Gale Courses learning platform by all residents of the service area.

**Indicate new or priority activities relating to this requirement for the plan year.**

Activities that will remain priority include the storywagon program, 1,000 Books Before Kindergarten, and the Gale Courses project. We will also be seeking to further partner with member counties in regard to a potential G.E.D. initiative that may occur.

**Indicate specific methods or means of communication with member libraries to fulfill this requirement.**

The individual we contract with is responsible for communicating with our member libraries on many of the aforementioned initiatives. This individual also conducts wrap-up meetings at the end of each summer to assess program effectiveness and begin the planning process for the next year. The System Administrator also seeks feedback from our member libraries in regard to program effectiveness, suggestions they may have for future services or programs.

**ASSURANCES (cont'd.)****Other Service Programs**

S.43.24(2)(i) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library system board after consultation with participating public libraries.

List each "other" service programs individually with ongoing activities and new or priority activities for the plan year under each program. For instance, if the system provides a bookmobile service program, list ongoing activities and new or priority activities for the bookmobile program. (Do not lump miscellaneous activities under a single "other" program.)

Lakeshores Library System provides the primary technical, logistical, and administrative support for the SHARE Consortium. SHARE serves primarily as an automation consortium, the goal of which is to provide a robust and well-managed automation system to its members. Supporting SHARE has become one of, if not the most important programs that Lakeshores Library System offers. Lakeshores offers support as a free service to its fifteen member libraries, and offers support in exchange for a fee to other libraries who are not members of Lakeshores.

**Administration**

- The system will not expend more than 20 percent of the state aid projected to be received in the plan year for administration.
- The 2016 system audit will be submitted to the division no later than September 30, 2018.

**Budget**

- A copy of your public library system budget by service program category and fund source for the plan year (see attached guidelines) is attached.

**COLLABORATIVE ACTIVITIES**

Summary of Activities Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2018 resource library contract.

LLS will once again participate in the WPLC Digital Library collection of ebooks and audiobooks procured through the OverDrive platform. Other ongoing collaborative activities will include the 1,000 Books Before Kindergarten App, the GALE Courses partnership with both of the participating LLS member counties, the SEWI Continuing Education partnership which serves our extended region, and the Great Outdoors @ Your Library program, which is a partnership between LLS and the Arrowhead Library System (ALS). Of particular note, LLS will be working with KCLS and ALS to establish a new delivery hub that will serve both as an in-system delivery sorting location and as a fulcrum point to link the three discrete delivery networks operated by the systems - with the ultimate purpose of creating an integrated delivery network to serve the greater SHARE service area.

Cost Benefit For each activity above, list the activity name and estimated cost benefit realized.

Activity	Amount
1. WPLC Digital Content	\$1,168,000
2. Delivery Linking Infrastructure With Kenosha County Library System and Arrowhead Library System	\$22,400
3. 1,000 Books Before Kindergarten Program w/ Bridges Library System	\$1,000
4. SEWI Continuing Education Partnership	\$13,000
5. Gale Courses Partnership w/ Racine & Kenosha Counties	\$24,000
6. Great Outdoors @ Your Library Partnership w/ Arrowhead Library System	\$5,000
7.	
8.	
9.	
10.	
<b>Cost Benefit Total</b>	<b>\$1,233,400</b>

**CERTIFICATION**

WE, THE UNDERSIGNED, CERTIFY that to the best of our knowledge, the information provided in this document and any attachments is true and correct, and that the system will be in full compliance with all applicable provisions of Chapter 43 of the Wisconsin Statutes for the year 2018.

Name of System Director Stephen Ohs	Signature of System Director ➤	Date Signed Mo./Day/Yr.
Name of System Board President Robert N. Miller	Signature of System Board President ➤	Date Signed Mo./Day/Yr.

**FOR DPI USE  
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature ➤	Date Signed Mo./Day/Yr.
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Comments

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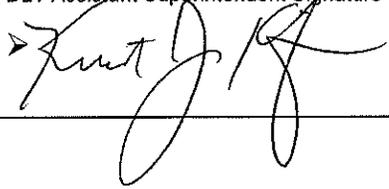
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Name of System Director Stephen Ohs	Signature of System Director 	Date Signed Mo./Day/Yr. 10.10.17
Name of System Board President Robert N. Miller	Signature of System Board President 	Date Signed Mo./Day/Yr. 10-11-17

**FOR DPI USE  
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature 	Date Signed Mo./Day/Yr. 12/4/17
Comments		

PUBLIC LIBRARY SYSTEM 2018 ANNUAL PROGRAM BUDGET					
Program	2018 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
<b>Technology, Reference and Interlibrary Loan*</b>					
1. Technology	\$104,116	\$0	\$0	\$26,540	
2. Reference	\$0	\$0	\$0	\$0	
3. Interlibrary Loan	\$44,658	\$0	\$0	\$7,540	
4. Electronic Resources	\$8,199	\$0	\$0	\$100,999	
<b>Program Total</b>	<b>\$156,973</b>	<b>\$0</b>	<b>\$0</b>	<b>\$135,079</b>	<b>\$292,052</b>
<b>Continuing Education and Consulting Service*</b>					
1. Continuing Education	\$4,000	\$0	\$0	\$0	
2. Consulting	\$66,837	\$0	\$0	\$11,310	
<b>Program Total</b>	<b>\$70,837</b>	<b>\$0</b>	<b>\$0</b>	<b>\$11,310</b>	<b>\$82,147</b>
<b>Delivery Services</b>	<b>\$96,299</b>	<b>\$0</b>	<b>\$0</b>	<b>\$43,557</b>	<b>\$139,856</b>
<b>Library Services to Special Users</b>	<b>\$11,239</b>	<b>\$0</b>	<b>\$0</b>	<b>\$27,592</b>	<b>\$38,831</b>
<b>Library Collection Development</b>	<b>\$10,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$6,282</b>	<b>\$16,782</b>
<b>Direct Payment to Members for Nonresident Access</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,035,243</b>	<b>\$4,035,243</b>
<b>Direct Nonresident Access Payments Across System Borders</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$95,204</b>	<b>\$95,204</b>
<b>Library Services to Youth</b>	<b>\$29,200</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$29,200</b>
<b>Public Information</b>	<b>\$1,997</b>	<b>\$0</b>	<b>\$0</b>	<b>\$2,500</b>	<b>\$4,497</b>
<b>Administration</b>	<b>\$103,678</b>	<b>\$0</b>	<b>\$0</b>	<b>\$11,310</b>	<b>\$114,988</b>
<b>Subtotal</b>	<b>\$252,913</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,221,688</b>	<b>\$4,474,601</b>
<b>Other System Programs</b>					
1. SHARE Consortium	\$178,232	\$0	\$0	\$253,454	\$431,686
2. Other Programs	\$0	\$0	\$0	\$31,990	\$31,990
<b>Program Total</b>	<b>\$178,232</b>	<b>\$0</b>	<b>\$0</b>	<b>\$285,444</b>	<b>\$463,676</b>
<b>Grand Totals</b>	<b>\$658,955</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,653,521</b>	<b>\$5,312,476</b>

\* These programs may be divided into subprograms at the discretion of the system. If choosing not to use subprograms, enter amounts on line 1. Line 4 is reserved for the amounts budgeted for electronic resources (see Program Budget Guidelines).